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**Organizational Design and Development
Students Channel Immediate Office**

April 12, 2001

Context

This document represents the results of the organizational design and development process for the Immediate Office in Students Channel. Accenture partnered with the Front Office team to examine the current organizational structure to make recommendations for the desired future state. This outlines the process to this design:

- Project Plan

- Approach

- Role Design

- Job Design

- Organizational Structure

    - Coordination of Jobs into Teams

    - Organizational Models

    - Interfaces with Internal and External Entities

- Transition Plan

- Appendix

Project Plan

The project planning process is made up of three key components which build on one another to create the new organizational model. Once the approach is realized and agreed upon, the organizational design and development phase begins, followed by transition planning.

JANUARY				FEBRUARY				MARCH	
Week of January 8	Week of January 15	Week of January 22	Week of January 29	Week of February 5	Week of February 12	Week of February 19	Week of February 26	Week of March 5	Week of March 12

APPROACH

ORGANIZATION DESIGN AND DEVELOPMENT PHASE

√ Define project scope and objectives

√ Develop project approach, timeline, and templates

√ Assess current organizational structure

√ Conduct interviews and define methodology

√ Determine responsibilities, tasks and activities that need to be performed

√ Group tasks into roles

√ Design jobs for core roles

√ Define required number of FTEs and grade levels

√ Determine centralization vs. decentralization of core business functions

√ Propose and select an operating organizational structure

√ Identify functional responsibilities and external interfaces

√ Craft PD's with unique qualifications

√ Create KSAs and crediting plans

• Recruit for new positions *(on hold due to moratorium)*

TRANSITION PLAN PHASE

• Fulfill staffing requirements *(on hold due to moratorium – effects remaining transition plan process)*

√ Communicate Organizational Model

• Transfer Knowledge, Skills and Responsibilities

• Orient new employees

• Train individual and new team

• Evaluate continuous improvement process

Symbol Key

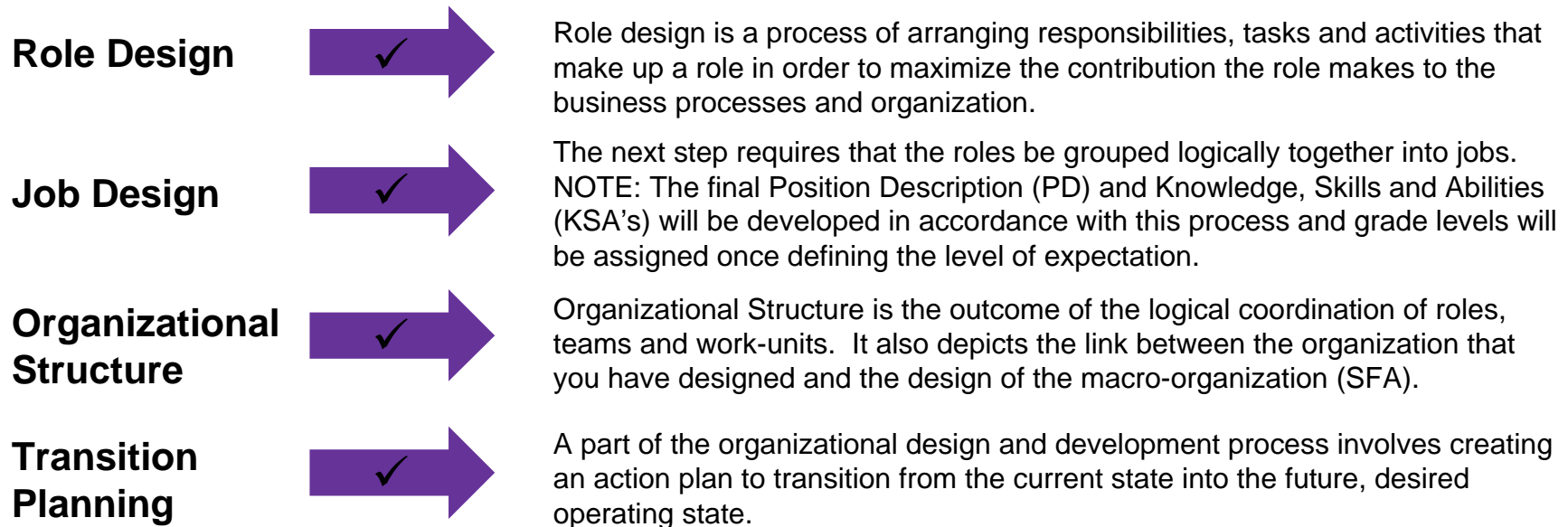• Future Task

√ Completed Work

WEEKLY STATUS MEETINGS

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Approach

The objective of organizational design and development is to create or modify organizational structures, management processes, and sub-cultures to ensure alignment with the business purpose. The process involves charting a physical arrangement that will allow the organization to meet internal and external environmental needs. The physical arrangement involves the allocation of skills, technology and other resources needed to support an organization's processes, structure, jobs and teams. The high-level steps are as follows:

BUSINESS PURPOSE

The Immediate Office is responsible for providing the Students Channel with the necessary organizational and business management capabilities to support the mission of the Students Channel.

Role Design ✓ ➔ Role design is a process of arranging responsibilities, tasks and activities that make up a role in order to maximize the contribution the role makes to the business processes and organization.

Job Design ✓ ➔ The next step requires that the roles be grouped logically together into jobs. NOTE: The final Position Description (PD) and Knowledge, Skills and Abilities (KSA's) will be developed in accordance with this process and grade levels will be assigned once defining the level of expectation.

Organizational Structure ✓ ➔ Organizational Structure is the outcome of the logical coordination of roles, teams and work-units. It also depicts the link between the organization that you have designed and the design of the macro-organization (SFA).

Transition Planning ✓ ➔ A part of the organizational design and development process involves creating an action plan to transition from the current state into the future, desired operating state.

Role Design: Grouping Tasks Into Roles

An effective role is one that makes sense to the employee, enables desired behaviors, and helps the organization meet its business objectives through a clear understanding of the tasks and processes.

Criteria for Grouping, Eliminating and Adding Roles

- Group common and related tasks

- Group tasks that require the same level of similar skills

- Eliminate the number of interfaces between roles

- Support performing a task from beginning to end where the role holder has clear responsibility for 'total' pieces of work

- Add roles that provide an easily identifiable impact on a process or customer

- Group roles that offer the holder the freedom to make decisions or perform tasks on his/her own while making a greater contribution to the business

Role Design

The steps to map tasks to roles involve: identifying natural grouping of tasks, mapping those tasks to roles and making sure all business processes and additional tasks are represented in the roles.

Responsibilities, Tasks and Activities

- Learning Contract
- Training (SFA U)
- Requirements
- Staffing and Recruiting
- Position Descriptions/KSAs
- Communications
- Rewards & Recognition
- Step Increases
- Database Updates
- Performance Management
- Budget Formulation
- Budget Execution
- S&E Budget Tracking
- Cost/Benefit Analysis
- IRB Representative
- Business Case Development
- Customer Interface
- Policy/Legal Monitoring

- Technical Expertise
- Internet/Intranet Updates
- Technical Troubleshooting
- Computer Coordination
- Personal Security
- Facilities Control
- Phone and Key Coordination
- Answer Phone
- Manage Schedule
- Travel Arrangements
- New and Exiting Procedures
- Office Administration
- Contracts Coordinator
- Troubleshooter/Thinker
- Reporting
- Monitoring
- Analysis
- Balanced Scorecard
- Point Person for the Channel
- Mod Partner Representative

Tasks Grouped Into Roles
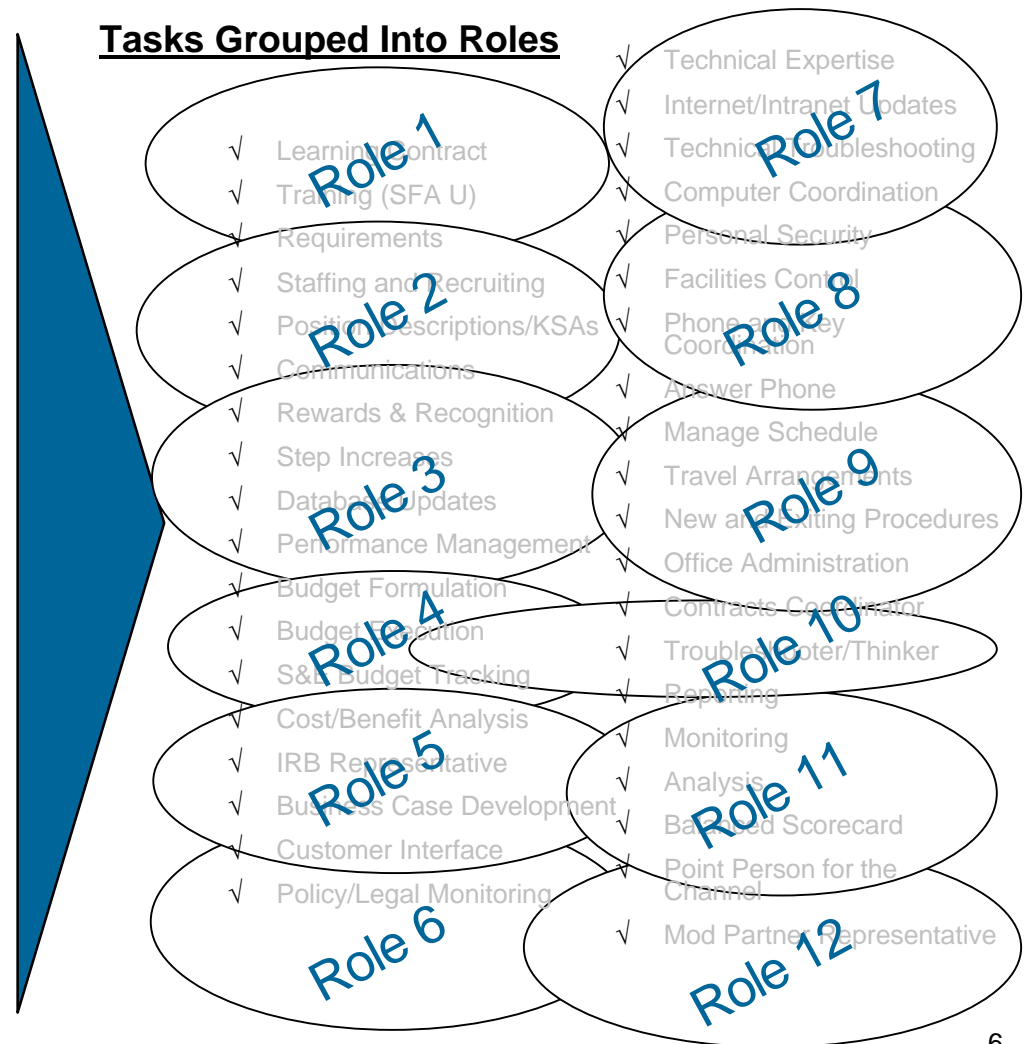
Job Design

The next step requires that the roles be grouped logically together into jobs. Certain considerations have to be taken into account during job design: workload, required skills, span of control, career development opportunities and job satisfaction levels.

Role 1
Role 2
Role 3
Role 4
Role 5
Role 6
Role 7
Role 8
Role 9
Role 10
Role 11
Role 12

Director
- √ IRB Representative
- √ Business Case Development
- √ Customer Interface
- √ Policy/Legal Monitoring
- √ Mod Partner Representative

Computer Specialist
- √ Technical Expertise
- √ Internet/Intranet Updates
- √ Technical Troubleshooting
- √ Computer Coordination

Budget Analyst
- √ Performance Management
- √ Budget Formulation
- √ Budget Execution
- √ S&E Budget Tracking
- √ Cost/Benefit Analysis
- √ IRB Representative
- √ Contracts Coordination

Office Manager
- √ Computer Coordination
- √ Personal Security
- √ Facilities Control
- √ Phone and Key Coordination
- √ New and Exiting Procedures
- √ Office Administration

Human Resource
- √ Learning Contract
- √ Training (SFA U)
- √ Requirements
- √ Staffing and Recruiting
- √ Position Descriptions/KSA's
- √ Communications
- √ Rewards & Recognition
- √ Step Increases
- √ Database Updates

Program Analyst.
- √ Troubleshooter/Thinker
- √ Reporting
- √ Monitoring
- √ Analysis
- √ Balanced Scorecard

Senior Specialist
- √ Balanced Scorecard
- √ Point Person for the Channel
- √ Mod Partner Representative

Staff Assistant
- √ Answer Phone
- √ Manage Schedule
- √ Travel Arrangements

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Coordination of Jobs into Teams

The objective of team design is to group jobs with similar skills/knowledge, thereby ensuring that the delivery of service or products is done in a structured and timely manner. The logical grouping of jobs into teams promotes knowledge sharing and skills transferring while reaching the desired business objectives.

STEPS	DESCRIPTION
Determine Span of Control	The way the initiative defines jobs and teams in the organizational structure will determine span of control. The wider the span of control in an organization, the shorter or flatter the structure will be. This enforces the principle of empowered employees.
Determine Reporting Lines	The reporting relationship is determined by the way the Initiative designs teams within the organization structure. The reporting relationship includes direct coaching and team member reporting lines. This information should be included in the job description.

JOBS

- Human Resources
- Budget Analyst
- Director
- Computer Specialist
- Office Manager
- Program Analyst

- Staff Assistant
- Senior Specialist

- Chief of Staff
- General Manager

TEAMS

Administrative Services

Immediate Office

=

Business Outcome

Responsible for providing the Students Channel with the necessary organizational and business management capabilities to support the mission of the Students Channel.

Organizational Models

The basic steps of the organizational structure process are: identify alternative "generic" models, assess alternatives and design a high-level operating model. The models highlighted in blue were considered by the Immediate Office.

- ***Functional*** *- Traditional organization structure where responsibility rests with the top manager. Each functional area has its own expertise and reporting relationships and responsibilities. (Example: Department of Education)*

- **Process -** An organization structure is designed by each major process. "Process owners" are identified for a process. Traditional reporting relationships are eliminated. (Example: Defense Logistic Agency)

- **Product** - The focus is on development of new products and management of existing products. New product groups are autonomous functional units with design, development, delivery, sales, service and marketing capabilities. (Example: Nike)

- ***Matrix*** *- A functional and product manager shares reporting responsibility for performance. Allows for a collaboration and blending of skills to provide customer-focused results. (Example: Accenture)*

- ***Customer-Focused*** *- Focus is client-oriented, typical of service culture organizations that want a partnering customer relationship that is consultative and communicative. The structure is typically decentralized. (Example: Nordstrom)*

Interfaces with Internal and External Entities

Assigning functional responsibilities to jobs provides the basis for developing unique requirements for the position description process. Understanding internal and external interfaces and relationships also enables the organization to function effectively.

ADMINISTRATIVE SERVICES

Director, Admin. Services

Functional Responsibilities:
- IRB Representative
- Business Case Development
- Customer Interface
- Policy/Legal Monitoring
- Mod. Partner Representative
- Liaison to other Channels
- Regional Rep.

Interfaces:
- Support CoS
- Oversee Admin. Srvs.
- Liasion to Channels
- Coordinate with IRB
- Work with Mod Partner Reps.

Budget Analyst

Functional Responsibilities:
- Performance Management
- Budget Formulation
- Budget Execution
- S&E Budget Tracking
- Cost/Benefit Analysis
- IRB Representative
- Contracts Coordinator

Interfaces:
- Work with CFO on required policies and procedures
- Coordinate budget planning process with Acquisitions & Contracts Perf. Office
- Work with Channel COTRs for support
- Back-up Representative for IT IRB and DSG

Office Manager

Functional Responsibilities:
- Computer Coordination
- Personal Security
- Facilities Control
- Phone and Key Coordination
- New and Exiting Procedures
- Office Administration
- Data Input for HR database
- Time and Attendance

Interfaces:
- Support Admin. Office on standard office operating procedures
- Channel POC for facilities compliance
- Channel POC for personal and computer security
- Work with Channel HR Rep.

Human Resource Specialist

Functional Responsibilities:
- Manage Learning Contract
- Training-SFA U Coordination
- Requirements
- Staffing and Recruiting
- PD/KSA Coordination
- Communications
- Rewards & Recognition
- Step Increase Management
- Database Management

Interfaces:
- Support Student's Channel
- Coordinate with SFA/HR
- Coordinate with DoE/HR
- Coordinate with EDC

Computer Specialist

Functional Responsibilities:
- Technical Expertise
- Internet/Intranet Updates
- Technical Troubleshooting
- Computer Coordination
- Data Coordination
- Conduit of Information

Interfaces:
- Work with CIO as Content Manager for Student's Channel
- Work with DoE on technical troubleshooting
- Work with Channel Admin. on computer support

Program Analyst

Functional Responsibilities:
- Balanced Scorecard
- Point person for Channel
- Back-up Mod. Partner Rep.
- GAOIG Reporting
- Monitoring
- Performance Analysis
- Data Analysis
- Troubleshooting
- Employee/Customer Satisfaction

Interfaces:
- Coordinate with Communications Office and Initiatives
- Work with Channel Representatives for special projects
- Work with Mod. Partner Reps.

IMMEDIATE OFFICE

Chief of Staff Immediate Office

Functional Responsibilities:
- Channel Policy and Procedures
- Oversee Students Channel

Interfaces:
- Support GM
- Work with Channel Director

Senior Specialist

Functional Responsibilities:
- Develop feeds to COO
- Administer Policy
- Accomplish Org. Objectives

Interfaces:
- Senior Advisor to GM
- Coordinate w/Schools business units

Staff Assistant

Functional Responsibilities:
- Manage Scheduling
- Travel Arrangements
- Customer Service
- Answer Phones

Interfaces:
- Administratively support CoS, Senior Specialist and Director of Admin. Services

Students Channel - Immediate Office Organizational Structure

9 FTEs Requested

Transition Plan

Implementation of the transition process begins as soon as the organization design is approved. It is the process of converting the new organization design and processes to allow for the effective and complete implementation of the new organization. The major transition categories and activities are as follows:

Design Organizational Structure	Fulfill Staffing Requirements	Communicate New Organization	Transfer Knowledge, Skills and Responsibilities	Orient New Employees	Train Individuals and New Team	Evaluate Continuous Improvement Process

√ Approve proposed organizational design

√ Define core business roles and responsibilities

√ Propose new organizational structure

Symbol Key

• Future Task

√ Completed Work

√ Draft Position Descriptions (PDs)

√ Define Knowledge Skills and Abilities (KSA's)

√ Create crediting plan

• Review from SFA/HR for publication

• Announce new positions

√ Determine key stakeholders (who needs to know)

√ Select vehicles (meetings, e-mail, voice mail)

√ Schedule timing (month, date)

√ Determine frequency (once, twice)

√ Create messages (what you want to say and how)

√ Communicate to key stakeholders

√ Determine activities that need to be transferred and to whom

√ Select method(s) of delivery

√ Schedule timeframe for knowledge transfer

√ Determine primary owner

√ Assess current and future skill proficiency required

• Transfer knowledge to new hires

√ What do new employees to students channel need to know?

√ What do employees already in Students Channel need to know?

√ Provide a working foundation for all employees

• Conduct orientation program to new employees

• Complete Individual Development Plans (IDP's) for all employees

• Work with a Learning Consultant from SFA U

• Conduct employee skills assessments

• Administer team development training

√ Create Mentor Program for new hires

• Evaluate team structure and work progress

√ Address methods of Improvement, if necessary

Chart Color Key

Completed Tasks

Tasks In-Progress

Future Tasks

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